# Defining top level strategic directions for the PCC 2010-2013

**Outline of the facilitated PCC strategic planning discussion on Nov. 5, 2009 9:00-4:15 pm**

**Desired Outcomes:**

- Identification of top level directions for the PCC 2010-2013 strategic plan.
- Definition of next steps to develop actions that support these strategic directions.

**Guidelines:** Attendees prepare in advance of the meeting, all meeting participants stay on topic during the facilitated discussion, wrap-up with clear next steps

**Process:**

> **Part One:** PCC Policy Committee (PoCo) representatives are asked to evaluate the top level directions from the current 2007-2010 plan attached to this document in Appendix A. Questions at the end of Appendix A will be helpful in evaluating and prioritizing these directions. Please think about these in advance of the meeting.
>
> > **Outcome:** A fresh perspective on the current directions, with each direction assigned a priority.
>
> **Part Two:** PoCo representatives are asked to respond briefly in writing (a paragraph or so) to one or more of the "Scenarios to spur additional thought." in Appendix B. The scenarios represent trends in our environment that might influence the decisions we make about the 2010-2013 strategic plan.
>
> Representatives may alternatively choose to develop thoughts about a scenario or trend of their choice.
>
> Please prepare your responses in advance of the meeting and share them on the PCC Policy Committee listserv: pccpol@loc.gov . The deadline for submitting responses is: Oct. 23, 2009.
>
> > **Outcome:** Identification of two or three most salient points ("top trends") that will affect PCC.
>
> **Part Three**: Consensus and decision making based on the outcomes of parts one and two.
>
> > **Outcome:** Four or five most important new strategic directions are identified. Next steps to develop actions that support these strategic directions are defined.

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**Resources**

The 2007-2010 plan is with specific actions and the status of each:
http://www.loc.gov/catdir/pcc/stratdir-2008.html

Participants may wish to consult the PCC Values Statement:
http://www.loc.gov/catdir/pcc/values.html  and the PCC Mission Statement
http://www.loc.gov/catdir/pcc/MissionStatement.html throughout the process for
evaluating existing and new strategic directions.

Many strategic directions in the 2007-2010 strategic plan have corollaries in *On the
Record: Report of the Library of Congress Working Group on the Future of
Bibliographic Control* http://www.loc.gov/bibliographic-future/news/lcwg-ontherecord-
jan08-final.pdf

Two recent task group reports may also be helpful in considering strategic directions:

The Final report of the TG on Internationalization of the Authority File
http://www.loc.gov/catdir/pcc/scs/IAFReport.pdf and:

The Final report of the MODS/DC Task Group:
http://www.loc.gov/catdir/pcc/sca/MODS-Final-Report.pdf

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**Draft agenda for Thursday Nov. 5, 2009**

**Part One: Evaluate strategic directions from the current 2007-2010 plan.**

**9:15-10:45:** Discussion of the 2007-2010 top-level directions. Evaluate and prioritize these directions using the questions in Appendix A and other resources listed above.

> **Outcome:** A fresh perspective on the current directions, with each direction assigned a priority.

**10:45-11:00 Break**

**Part Two: Scenarios to spur additional thought: trends in 2010-2013**

**11:00-12:15** Discussion of the scenarios in Appendix B (or a scenario of your own choosing). How do our responses to these scenarios inform our future?

> **Outcome:** Identification of two or three most salient points ("top trends") that will affect PCC.

**12:15-1:15 Lunch**

**Part Three: Consensus and decision making**

**1:15-2:45** Using the two outcomes from parts one and two, develop consensus on the four or five most important new directions. The list MUST be concise and the directions must be realistic. This process should be:
- A cold, hard look at the activities we undertake in light of their sustainability, benefits, etc. What can be kept and what must go, and why?
- A search for opportunities and strategies for expanding collaboration in the environment for 2010-2013

**2:45-3:00 Break**

**3:00-4:15:** Finalize the wording of the new strategic directions and outline next steps for fleshing out the plan.

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**Appendix A**

**Part One**

**Top-level strategic directions from the 2007-2010 PCC Strategic Plan**
http://www.loc.gov/bibliographic-future/news/lcwg-ontherecord-jan08-final.pdf

**SD1: Be a forward thinking, influential leader in the global metadata community**

The PCC is a primary organization bringing together in collaboration leaders in the
global cataloguing and metadata field. It is in a unique position to see the way forward, to
articulate that future vision for practitioners in the field, to influence the future and to
lead the way through cooperative action.

**SD2: Redefine the Common Enterprise**

The Program achieves its goals through cooperative efforts to increase cost-effective
creation, sharing, and timely availability and use of authoritative records. Current trends
in the web environment are leading away from a model based only on standard records
towards an emphasis on interoperability between multiple standards for metadata used
and recycled between book industry, rights management, library and information sectors,
increasingly including machine-generated metadata. The PCC will address these trends in
relation to its own goals by exploring potential new economic models for cooperation
that cut across traditional sector boundaries by identifying and exploiting common
metadata needs.

**SD3: Build on and Expand Partnerships and Collaborations in Support of the
Common Enterprise**

In order to respond more effectively to the fundamental challenges facing the PCC in the
years to come, it is imperative that the organization continues to expand on existing
partnerships as well as form new collaborative ventures. By working with others to
increase and improve communication, cooperation, and collaboration, new innovative
outcomes will have a positive impact on the continued viability and success of the
Program.

**SD4: Pursue Globalization**

In light of the increasingly global scope and reach of information, especially through the
Web, the PCC needs to look beyond North America in seeking metadata and access
value. While serious barriers of language, standards, technology and culture exist, they
can be overcome or mitigated through flexibility, if the gain for all partners is sufficient.

**SD5: Lead in the Education and Training of Catalogers**

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The PCC will continue its well-regarded program of cataloguing training, but will increasingly turn to educating the profession for the future of cataloguing and libraries, and on developing future leaders for the changing cataloguing and metadata world of tomorrow. Education will increasingly focus on the bedrock foundation of principles which can be adapted to changing needs, audiences, technologies, and on the flexibility needed by future leaders to adapt.

Questions to consider for the next strategic plan:

**Part One Questions:**

1. Are these strategic directions still relevant?

2. Given the current environment are they still realistic? Consider factors such as the economic climate, aging of the workforce, new products and interfaces with "deep web" capabilities, availability of open source technology solutions, opportunities for collaboration with other metadata communities, etc.

3. Which of these directions is most important?  Which is least?

4. What has changed in the past 5 years to make us reconsider our plans?

5. What emerging trends in the next 5 years should we pay attention to?

6. Would you recommend new more relevant and attainable directions?

**Appendix B**

**Part Two**

**Scenarios to spur additional thought**

It may be helpful to consider a few questions for thought. These questions pose outcomes that may or may not come to pass. But they are at least within the realm of possibility and are certain to have a significant impact on our policies and practices if they do occur. While reviewing them, thinking about how PCC could or should respond (if at all) would be useful in helping us identify new directions or to re-affirm existing ones.

**Instructions:** Before the PoCo meeting select at least one of these scenarios or one that you wish to raise and provide a written response or any thoughts you have about the scenario.

**Scenario One:**
Let us assume that the Google Books settlement is completed and Google is selling subscription access to 7.5 million titles in its collection. The service [i.e., Google Books] has essentially become a top ARL library online, with both metadata and full-text available. But the collection is not static. New titles, both out-of-copyright and copyrighted, in and out of print, are being added constantly. What implications does this development have for our work? How would our practices need to evolve if full texts for resources were available through the "union catalog" of Google?

**Scenario Two:**
The serial publishing market is becoming increasingly strained under economic pressures. Libraries are being forced to break their package deals and pay only for the titles with the most use. The "pay-per-view" model of access to journal content is becoming more widely accepted, with many institutions buying blocks of article hits much as we once purchased blocks of searches from the bibliographic utilities. This has changed the way users look for and at article content. The article, not the journal, has become primary. Institutional and subject repositories like arXiv are only accelerating the decline of journal hegemony. Yet we have focused a great deal of energy on creating standards for journal description and on training people to follow those standards. Is this a wise investment for the future? Should we be looking at the scope and scale of our serials cataloging programs in light of these developments?

**Scenario Three:**
The economic crisis has abated somewhat, but its aftershocks are still being felt in libraries. The financial challenges which eroded endowments and government support have been compounded by the demographics of the profession. Indeed, to shave expenses, many institutions are offering incentives for senior staff to retire, and the positions vacated by these staff are going unfilled. The remaining work is being handed down to lower-level staff or to third parties (e.g., materials vendors). Have we positioned

ourselves to respond to a shrinking pool of skilled catalogers, many of whom provide the backbone of our task groups and standing committees, and serve as our volunteer trainers? How will we maintain our standards when cataloging becomes "deprofessionalized"?

**Scenario Four:**
Technology continues to challenge us.  Technological advances in information science far exceed our ability to respond to them.  Although we struggle with funding disparities that provide private enterprises with far greater financial resources, many of our challenges lie in our professional culture of deliberation and consensus decision-making. Whatever the benefits of that culture, the long decision making process places an additional burden on the community's ability to respond to new developments in a timely and effective manner.  What role, if any, does PCC have in helping to move the culture from one that has a bias for lengthy deliberation to one that privileges action and responsiveness?

**Scenario Five:**

According to a recent article in *The Chronicle of Higher Education* http://chronicle.com/article/After-Losing-Users-in/48588/ new tools that incorporate "Web-scale index searching" have been developed that outperform early generation federated search tools. The advantages of these "next generation" interfaces include the ability to combine licensed indexing or content with integrated access to local holdings. They provide a Google like single search box, result ranking and relevancy features. Critics have suggested that these new next generation tools "dumb down" the library catalog, proponents suggest such tools help us avoid the "marginalization" of the catalog and other library resources by more fully integrating them with web features. Commercial versions of these tools are powerful in providing access to licensed content and indexing from a wide range of providers but are costly. Open source versions of these tools are less expensive than commercial versions, and can more easily be customized to provide access to local holdings, but technical support may be lacking and dependent on local resources. This scenario is unraveling now and perhaps will gain momentum in the near future. Are there roles for the PCC in the decision making process involved in implementing these next generation catalogs?